

Fig. 1

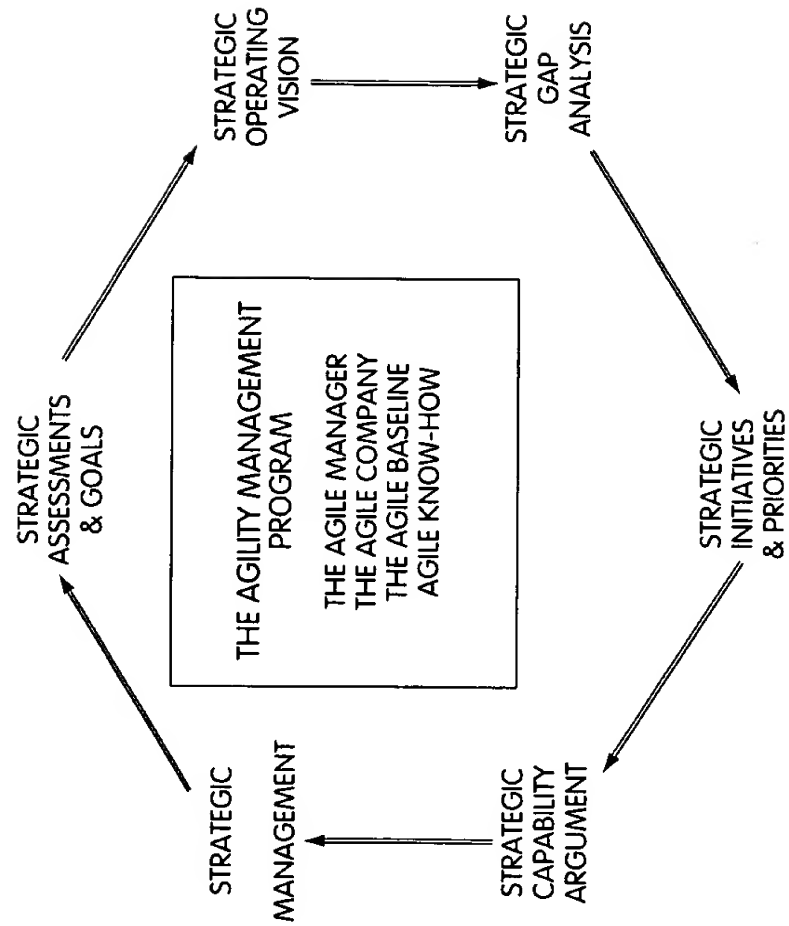


Fig. 2

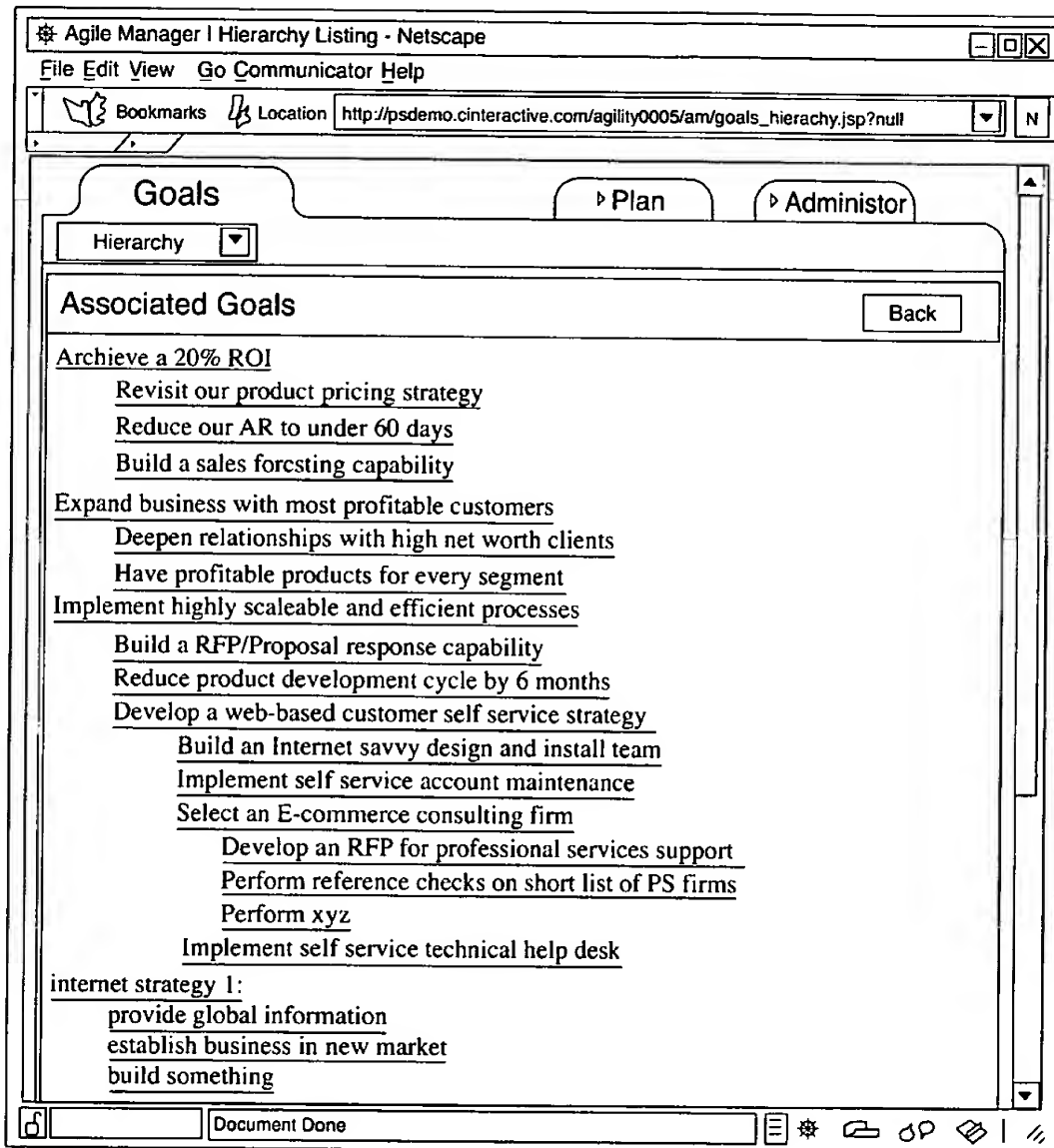


Fig. 3

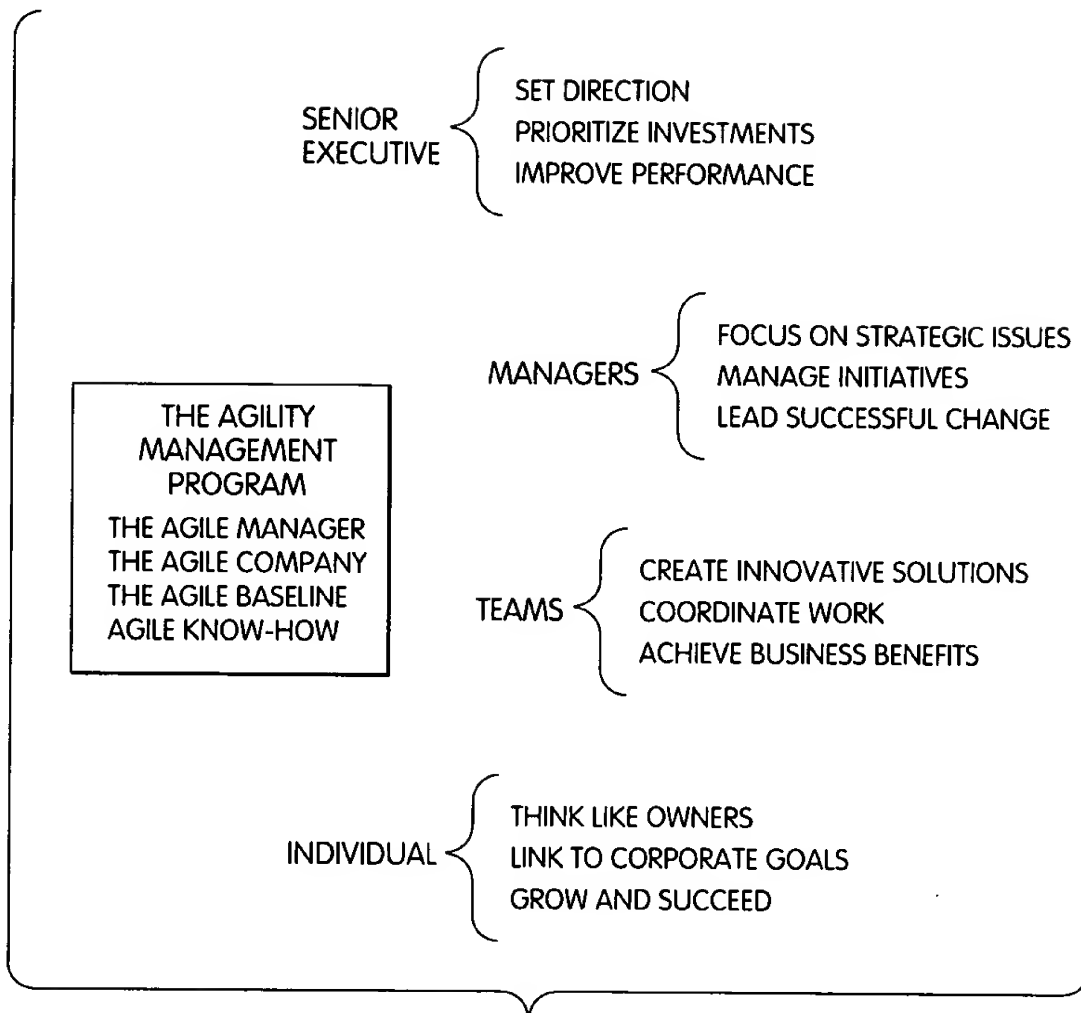


Fig. 4



RESEARCH BASED DIAGNOSTICS REDUCE  
ORGANIZATIONAL BARRIERS

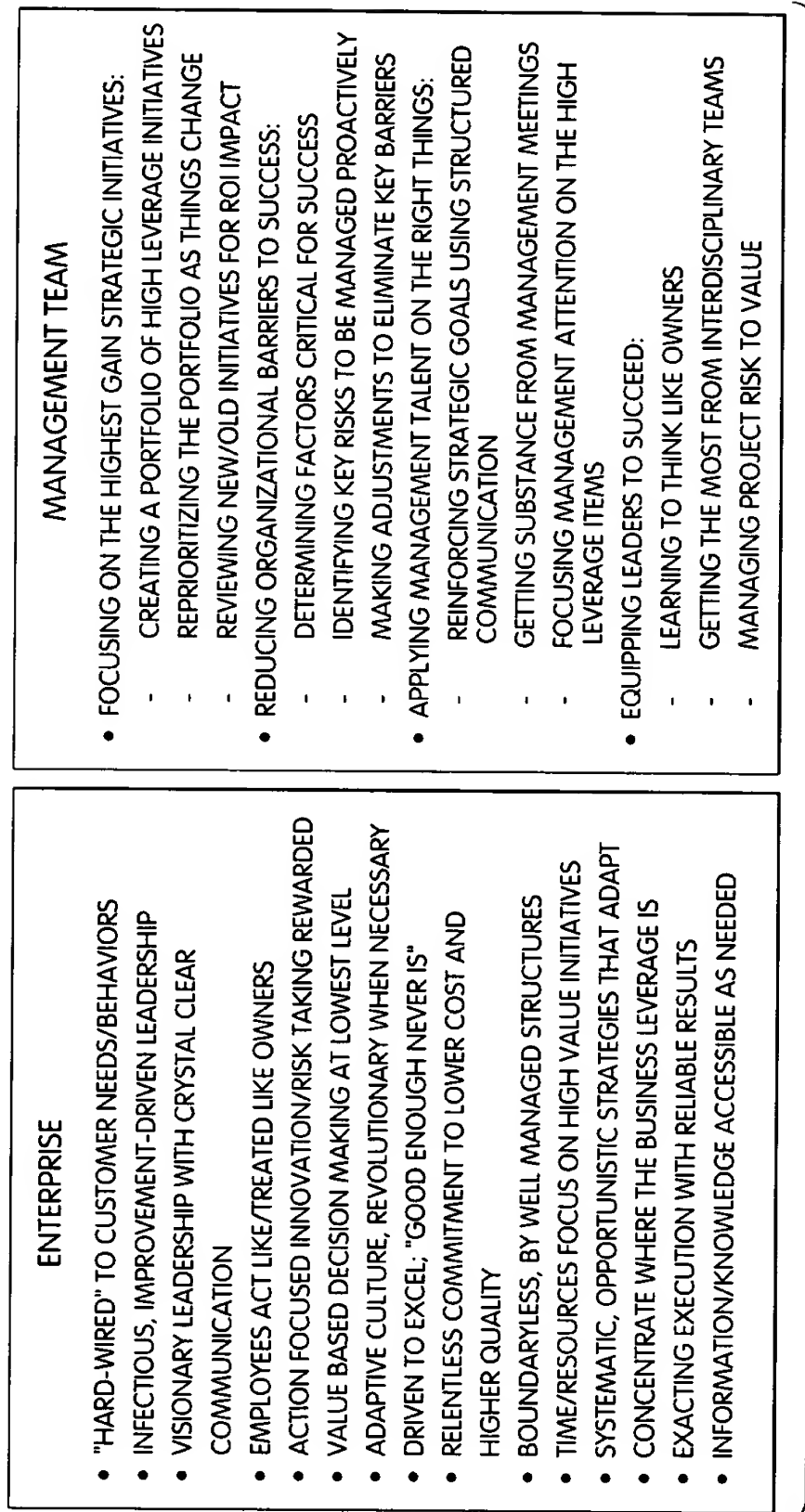


Fig. 5



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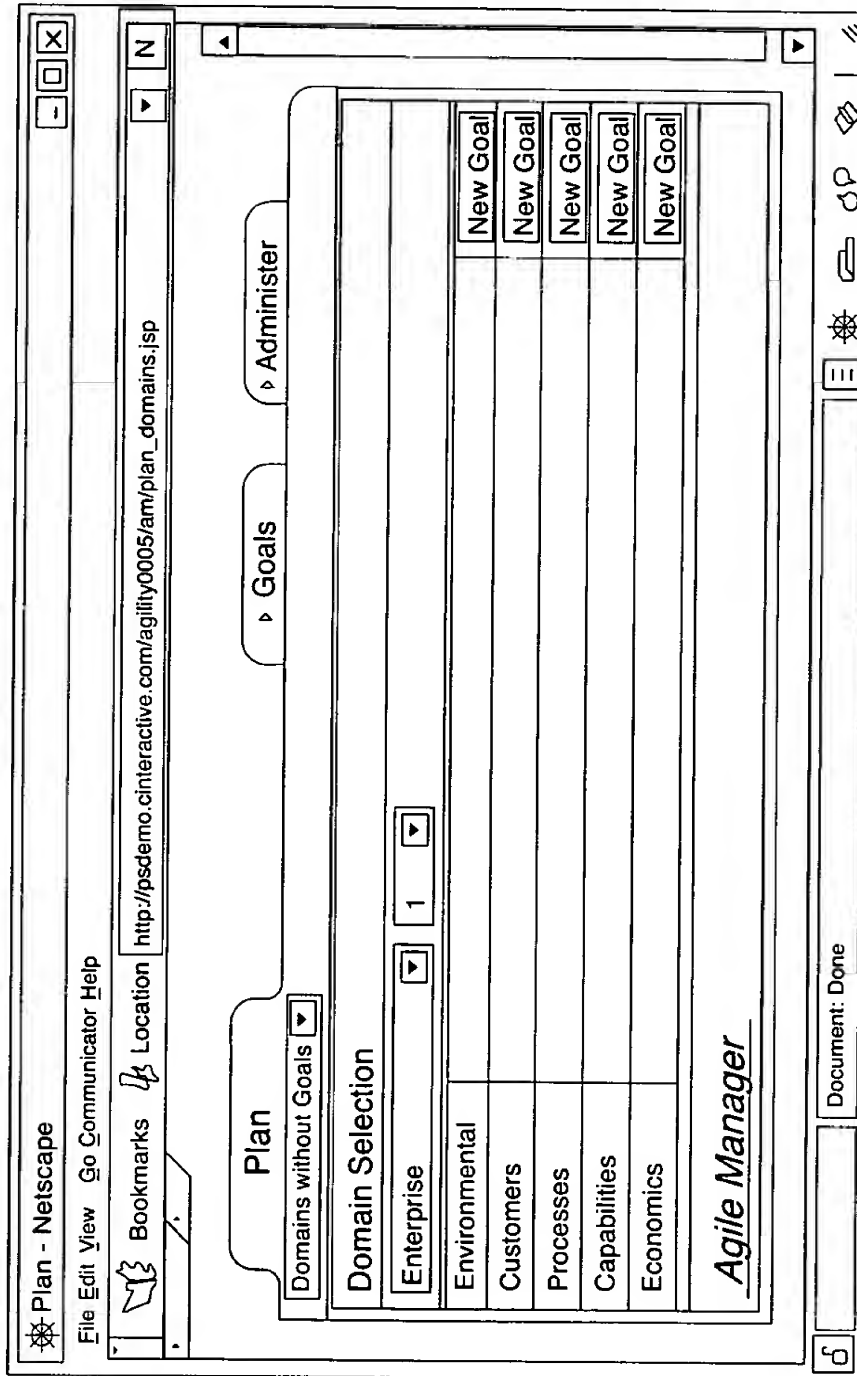


Fig. 6



7/40

A Edit New Goal - Netscape

File Edit View Go Communicator Help

Bookmarks Location ity0005/am/vcl\_new\_project.jsp?parent=PSCDR565336755E10D72891DBEA017F50 N

Add a Contributing Goal

New Goal

Goal Name  
New Goal

Goal Objective

Domain: [None] ▼

Status: not started ▼

Priority: 5 ▼

Risk: 5 ▼

Stage: [None] ▼

Due Date: 12/31/99

Investment:

Return:

Agile Manager

Document Done

Fig. 7

Plan

Domains without Goals ▾

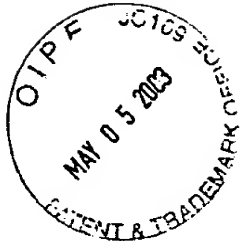
Goals

Administrator

Domain Selection	
Enterprise ▾	Depth ▾
Environmental	New Goal
Market Trends	New Goal
Competitors	New Goal
Technical Innovation	New Goal
Regulatory	New Goal
Customers	New Goal
Relationships	New Goal
Products	New Goal
Services	New Goal
Processes	New Goal
Core Processes	New Goal
Business Acquisition	New Goal
Business Development	New Goal
Product Development	New Goal

Fig. 8





9/40

Plan - Netscape  
File Edit View Go Communicator Help  
Bookmarks Location [http://psdemo.cinteractive.com/agility0005/am/plan\\_domains.jsp](http://psdemo.cinteractive.com/agility0005/am/plan_domains.jsp) N

Plan

Domains with Goals

Domain Selection

Enterprise

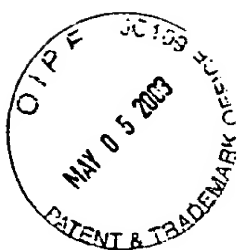
1

Environmental		New Goal
Customers	■ Expand business with most profitable customers	New Goal
Processes	■ Implement highly scalable and efficient processes	New Goal
Capabilities	■ Leverage our core competencies	New Goal
Economics	■ Achieve a 20% ROI	New Goal

Agile Manager

Document: Done

Fig. 9



10/40

Values ✕

Title **Business development assesment**

Subtitle current situation vs. desired state

Show Average Top Value Number of

1 points 7 6

Average	Value	Label
5	3	business people vs. just sales people
6.5	2.5	sell solutions not just products
7	4	customer vs. internally focused
6	3.5	business makers vs. order takers
5	4	profitability vs. sales focused
6	4.5	deal well at senior vs. just technical level
5.5	4	world class vs. unacceptable service
7	3	build value based client relationships
0	0	
0	0	

Animation

Spin Rate 84

Increment 3

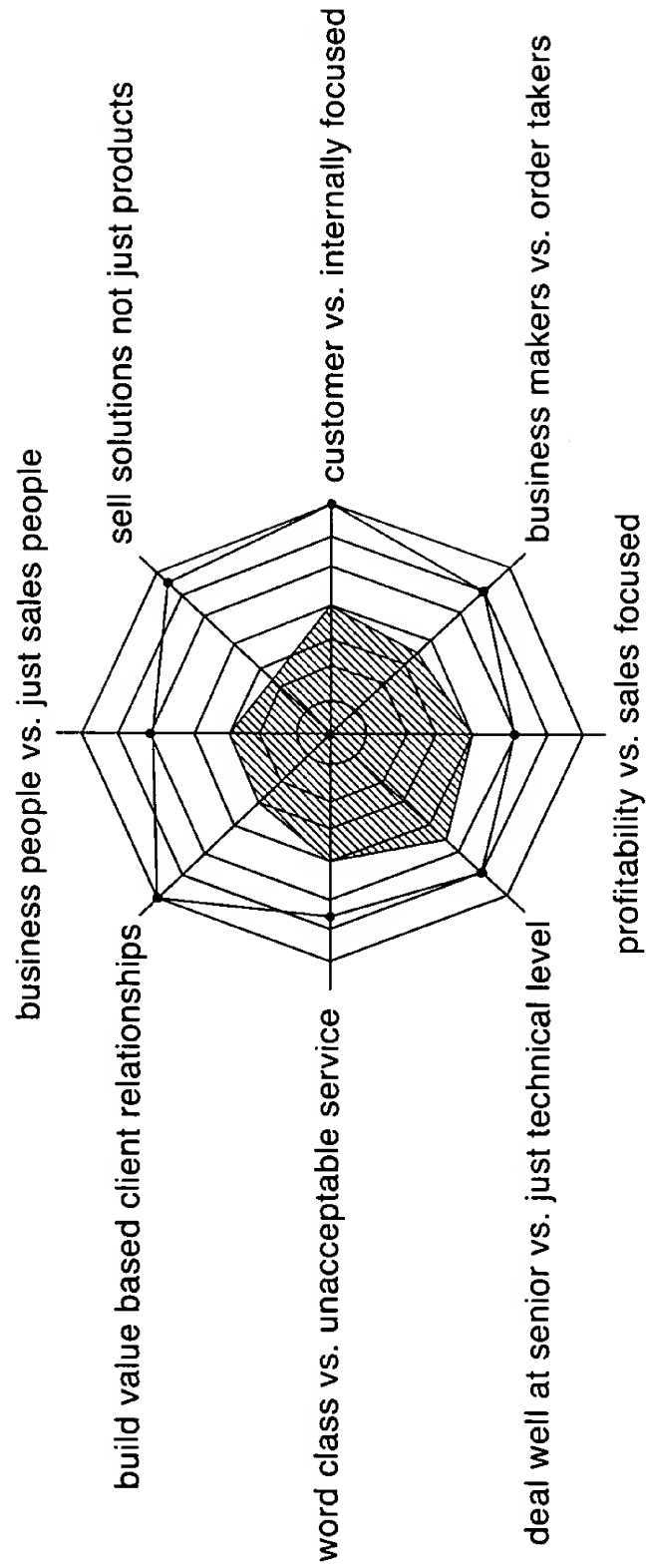
OK

Cancel

Clear

Fig. 10

**Business development assessment**  
*current situation vs. desired state*



**Fig. 11**



12/40

Agile Manager | Act | Gap Analysis - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /act\_gaps.jsp?domain=&depth=depth&proj=PSCDB565336755E10072391DBEA017F N

Act Goals Plan Administer

Gap Analysis

Expand business with most profitable customers

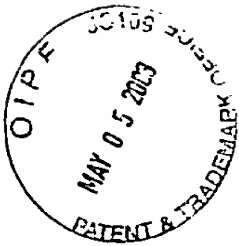
Cross sell and up sell our products to our existing client base from a position of strength.

Enterprise Depth

Domain	Contributing Goal	Actual/Desired	Gap	Add
Environmental				Add
Market Trends				Add
Competitors				Add
Technical Innovation				Add
Regulatory				Add
Customers				Add
Relationships	Deepen relationships with high net worth clients	10/10	0	Add
Products	Have profitable products for every segment	6/10	4	Add
Services				Add
Processes				Add
Core Processes				Add
Product Development				Add
Business Development				Add

Document Done

Fig. 12



13/40

Expand business with most profitable customers | Summary - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /agility0005/arm/act\_summary.jsp?proj=PSCDB565336755E10072391DBEA017F30 N

Act Goals Plan Administer

Summary

Expand business with most profitable customers

Parent Goal:

Owner: Doug Beaven

**Objective**  
Cross sell and up sell our products to our existing client base from a position of strength.

**Domain:** Customers  
**Status:** Onot started  
**Due Date:** 09/01/99  
**Actual Goal:**  
**Desired Goal:**  
**Gap:**  
**Priority:** 5  
**Risk:** 3  
**Stage:** Analysis/Assessment  
**Investment:** \$125,000.00  
**Payback:** \$16,750,000.00

**History**  
(04/14/99) SubProject - Added subproject: Identify clients with the greatest \$ opportunity.  
(04/14/99) SubProject - Added subproject: Have profitable products for every segment  
(04/13/99) Date - Target date changed to 09/01/99.  
(04/13/99) Create - Project created.

Agile Manager

Document Done

Fig. 13

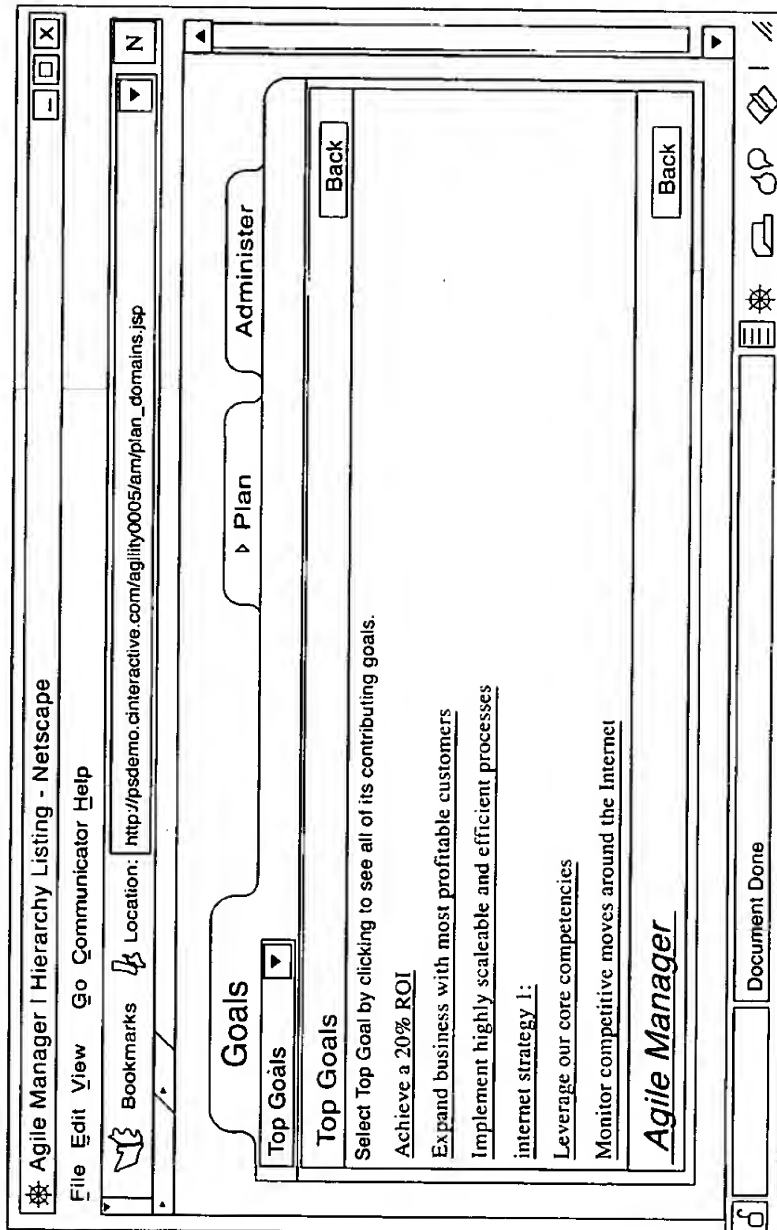


Fig. 14



Goals

[Select] ▼

► Plan

► Administrator

View Contributing Goals		Show Columns for:		Priority
<u>Expand business with most profitable customers</u>	<u>Cost</u>	<u>Payback</u>	<u>Priority</u>	<u>Due</u>
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Have profitable products for every segment	75,000	250,000	5	33w
Top Goal Total:		\$825,000.00	\$5,250,000.00	
<u>Agile Manager</u>				

Fig. 15



Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location [http://psdemo.cinteractive.com/agility0005/am/goals\\_sorted.jsp](http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp)

### Goals

[Select] ▼

Plan Administrator

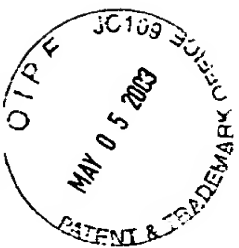
View All Goals show Columns for: Domain ▼

	Cost	Payback	Priority	Due
<b>Environmental</b>				
<u>New Goal</u>	-	-	5	-
<b>Competitors</b>				
<u>Find new company or spin off threats</u>	5,000	50,000	5	10w
<u>Monitor competitive moves around the Internet</u>	5,000	50,000	3	8w
<b>Technical Innovation</b>				
<u>new internet strategy</u>	-	-	5	-
<b>Customers</b>				
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Increase visibility</u>	-	-	5	-
<b>Relationships</b>				
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Understand recent competitive wins</u>	1,000	10,000	5	4w
<b>Products</b>				
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
<b>Services</b>				
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w

Document Done

Fig. 16





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Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location [http://psdemo.cinteractive.com/agility0005/am/goals\\_sorted.jsp](http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp)

### Goals

[Select] ▼

Plan Administrator

View All Goals show Columns for: Priority ▼

	Cost	Payback	Priority	Due
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Increase our technology R&amp;D capability</u>	555,555	2,000,000	5	34w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Implement highly scaleable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Implement self service technical help desk</u>	85,000	100,000	4	6w
<u>Build a RFP/Proposal response capability</u>	75,000	100,000	4	8w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Build a sales forecasting capability</u>	35,000	100,000	4	12w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w

Document Done

Fig. 17



18/40

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location [http://psdemo.cinteractive.com/agility0005/am/goals\\_sorted.jsp](http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp)

### Goals

[Select] [v]

Plan Administrator

View All Goals Show Columns for: Status [v]

	Risk	Owner	Stage	Status	Due
<input type="radio"/> Ask clients about our perceived competencies	5	<a href="#">Doug Beaven</a>	Requirements Gathering	not started	1w
<input checked="" type="radio"/> Develop a web-based customer self service strategy	5	<a href="#">Joe Smith</a>	Requirements Gathering	on track	21w
<input type="radio"/> Find new company or spin off threats	5	<a href="#">Doug Beaven</a>	Implement	not started	10w
<input checked="" type="radio"/> Implement GSTP by yearend	5	<a href="#">Doug Beaven</a>	Analysis/Assessment	on track	34w
<input checked="" type="radio"/> Implement self service technical help desk	5	<a href="#">Mike Jones</a>	Business Case Development	on track	6w
<input type="radio"/> Increase out technology R&D capability	5	<a href="#">Joe Smith</a>	Prototype	not started	34w
<input type="radio"/> Increase visibility	5	<a href="#">chris curran</a>	-	not started	-
<input type="radio"/> New Goal	5	<a href="#">Doug Beaven</a>	-	not started	-
<input type="radio"/> Perform xyz	5	<a href="#">Doug Beaven</a>	-	not started	-
<input checked="" type="radio"/> Recruit and hire world class industry talent	5	<a href="#">Doug Beaven</a>	Roll-out	on track	34w
<input checked="" type="radio"/> Reduce our AR to under 60 days	5	<a href="#">Doug Beaven</a>	Implement	off track	8w
<input checked="" type="radio"/> Understand recent competitive wins	5	<a href="#">Mike Jones</a>	Analysis/Assessment	on track	4w
<input checked="" type="radio"/> increase auto adjudication rates	5	<a href="#">Doug Beaven</a>	Build	on track	86w
<input type="radio"/> internet strategy 1:	5	<a href="#">Doug Beaven</a>	-	not started	-

Document Done

Fig. 18



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Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location [http://psdemo.cinteractive.com/agility0005/am/goals\\_sorted.jsp](http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp)

### Goals

[Select] ▼

► Plan ► Administrator

View All Goals Show Columns for: Priority ▼

	Cost	Payback	Priority	Due
<u>Expand business with most profitable customers</u>	125,000	16,750,000	45	17w
<u>implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Reduce Breakeven on New Business</u>	10,000	2,500,000	4	8w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Increase our technology R&amp;D capability</u>	555,555	2,000,000	5	34w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Implement highly scalable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	4	21w
<u>Reduce our AR to under 60 days</u>	5,000	150,000	5	8w

Document Done

Fig. 19



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Goals

PlanAdministor

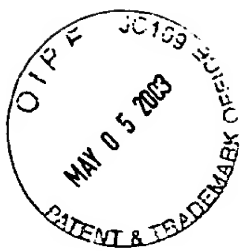
[Select]

View All Goals

Show Columns for: Status

	Risk	Owner	Stage	Status	Due
☑ <u>Have profitable products for every segment</u>	4	<u>Mike Jones</u>	Requirements Gathering	needs attention	33w
☑ <u>Monitor competitive moves around the Internet</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	needs attention	7w
☑ <u>Reduce Breakeven on New Business</u>	4	<u>Doug Beaven</u>	Implement	needs attention	7w
☑ <u>Develop an RFP for professional services support</u>	4	<u>Joe Smith</u>	Retrospective	completed	-4w
☑ <u>Perform reference checks on short list of PS firms</u>	4	<u>Doug Beaven</u>	Retrospective	completed	-4w
○ <u>Ask clients about our perceived competencies</u>	5	<u>Doug Beaven</u>	Requirements Gathering	not started	1d
○ <u>Eclipse competition with our e-comm capability</u>	5	<u>Doug Beaven</u>	-	not started	-
○ <u>Expand business with most profitable customers</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	not started	16w
○ <u>Find new company or spin off threats</u>	5	<u>Doug Beaven</u>	Implement	not started	9w

Fig. 20



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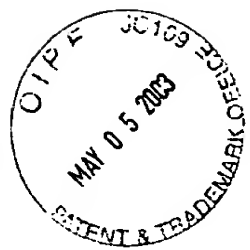
**Goals**

Plan Administrator

[Select] show Columns for: Status

[Select]		Risk	Owner	Stage	Status	Due
Hierarchy						
Select Domain						
Top Goals						
All Goals						
Alerts						
Search						
New Goal						
Products for	4	Mike Jones	Requirements Gathering	needs attention	33w	
moves	5	Doug Beaven	Analysis/Assessment	needs attention	7w	
around the internet						
Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w	
Develop an RFP for professional services support	4	Joe Smith	Retrospective Review	completed	-4w	
Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective Review	completed	-4w	
Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d	
Eclipse competition with our e-comm capability	5	Doug Beaven	-	not started	-	
Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w	
Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w	
Increase our technology R&D	5	Joe Smith	Prototype	not started	33w	

Fig. 21



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Goals

[Select] ▼

Administor

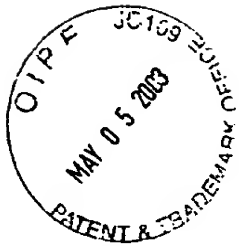
View Contributing Goals

Show Columns for: Domain ▼

	Cost	Payback	Priority	Due
Expand business with most profitable customers				
Customers				
Relationships				
Deepen relationships with high net worth clients	750,000	5,000,000	5	5w
Products				
Have profitable products for every segment	75,000	250,000	5	33w
Top Goal Total:	\$825,000.00	\$5,250,000.00		

Agile Manager

Fig. 22



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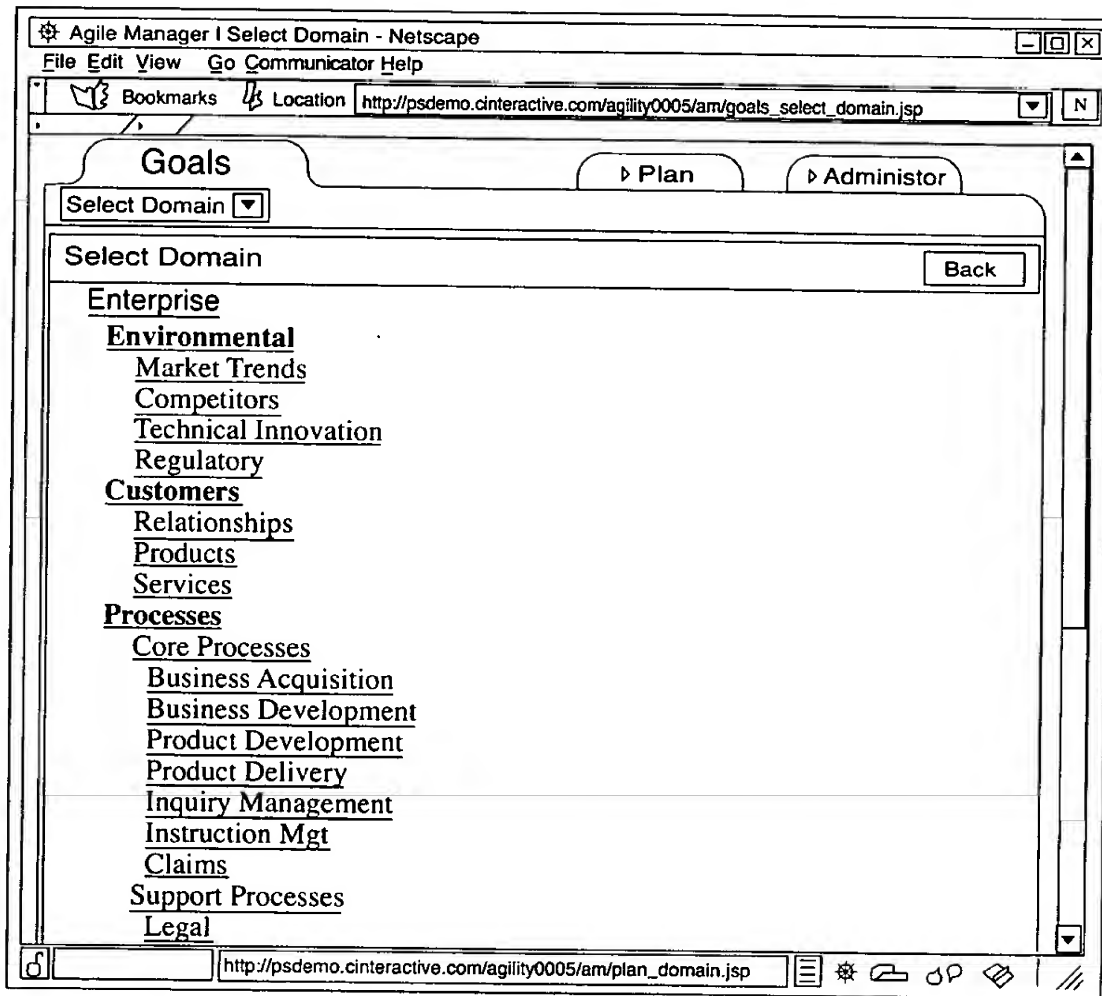
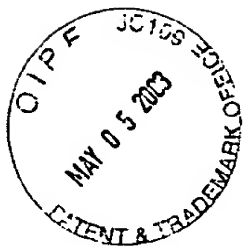


Fig. 23



Plan		Goals	Administer
Domains without Goals ▾			
Domain Selection			
Relationships ▾		Depth ▾	
Relationships		New Goal	
<ul style="list-style-type: none"><li>■ Ask clients about our perceived competencies</li><li>■ Deepen relationships with high net worth clients</li><li>■ Understand recent competitive wins</li><li>■ build the franchise around customer satisfaction</li></ul>			
Agile Manager			

Fig. 24





25/40

**Search Results - Netscape**  
File Edit View Go Communicator Help

Bookmarks Location [http://psdemo.cinteractive.com/agility0005/am/goals\\_search.jsp?projects=true](http://psdemo.cinteractive.com/agility0005/am/goals_search.jsp?projects=true)

**Search Goals** ☐ Cancel

Search Goals:  ☐ Search

Search Results:  
*none*

Agile Manager ☐ Cancel

Document: Done

Fig. 25

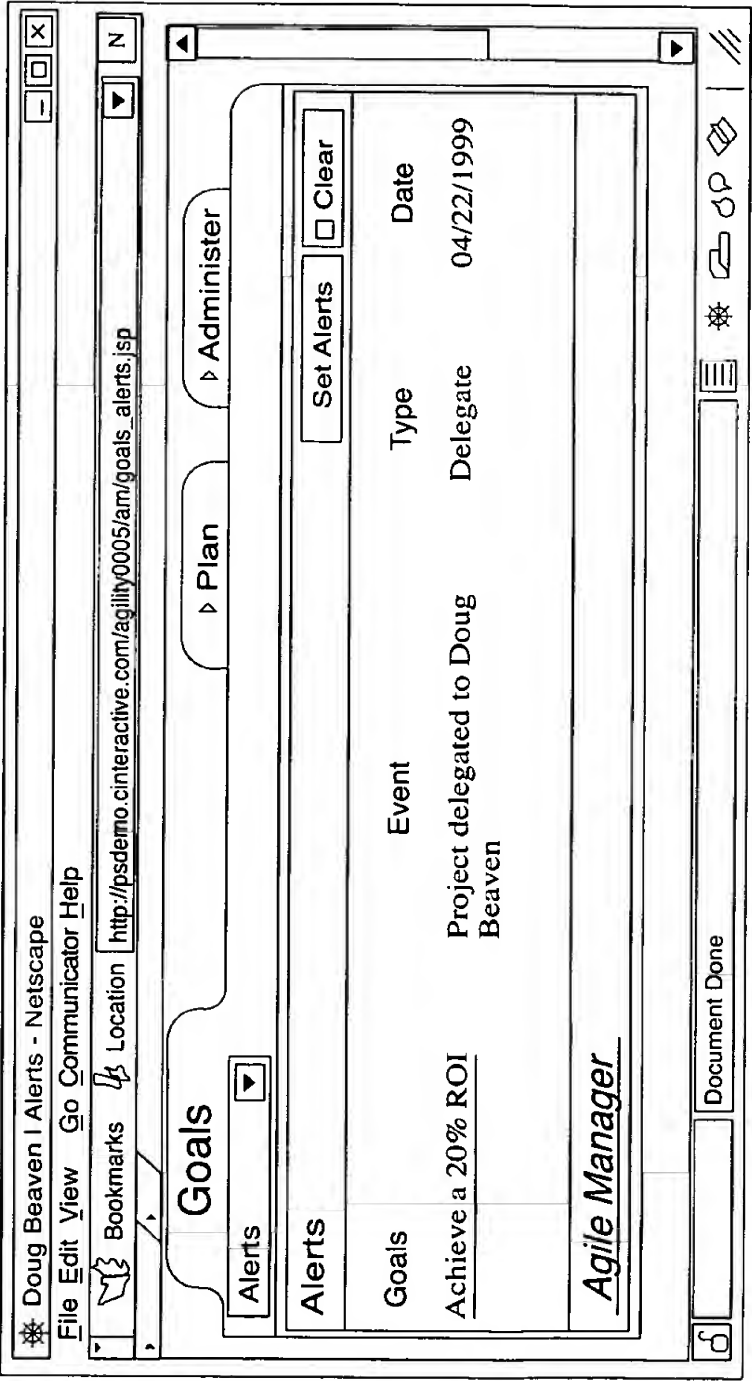
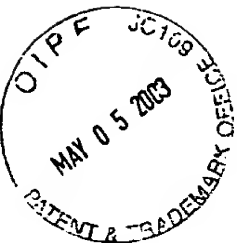


Fig. 26



Expand business with most profitable customers | Control Panel - Netscape

File Edit View Go Communicator Help

Bookmarks Location: om/agility0005/am/act\_control.jsp?proj=PSCDB565336755E10D72391DBEA017F30

Control Panel

Act

Goals

Plan

Administer

Expand business with most profitable customers

Cancel

Submit

Access Control

	None	Read	Edit	Own
Everybody	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group -	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group -	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

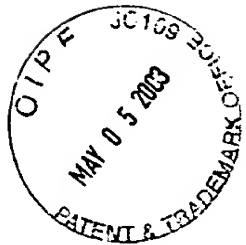
Cancel

Submit

Agile Manager

http://psdemo.sinteractive.com/agility0005/am/admin\_profile.jsp

Fig. 27



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Edit Achieve a 20% ROI - Netscape  
File Edit View Go Communicator Help  
Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals\_sorted.jsp

---

**Edit Summary**

**Achieve a 20% ROI**

Goal name  
Achieve a 20% ROI

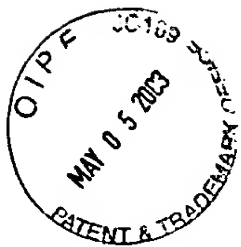
Goal Objective  
Ensure that the revenue and profit contribution is significant enough to return to the Company and investors an ROI of 20% or greater.

Domain: Economics  
Status: off track  
Due Date: 12/31/99  
Actual Goal: 7  
Desired goal: 10  
Priority: 5  
Risk: 4  
Stage: Implement  
Investment: 2500000.0  
Return: 1250000.0

**Agile Manager**

Document Done

Fig. 28



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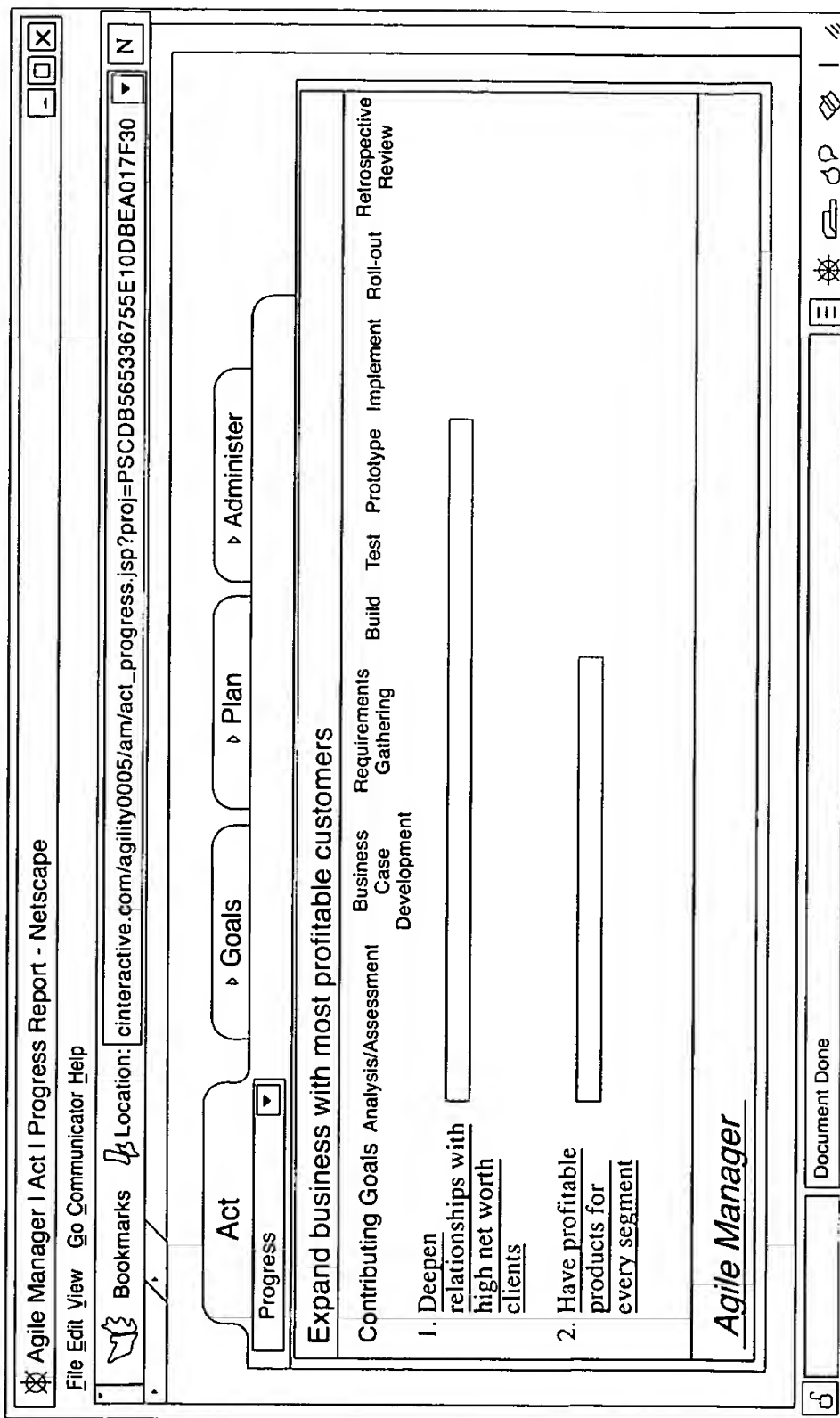
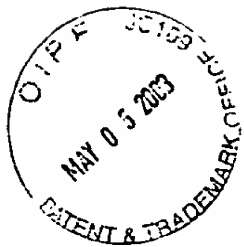


Fig. 29



30/40

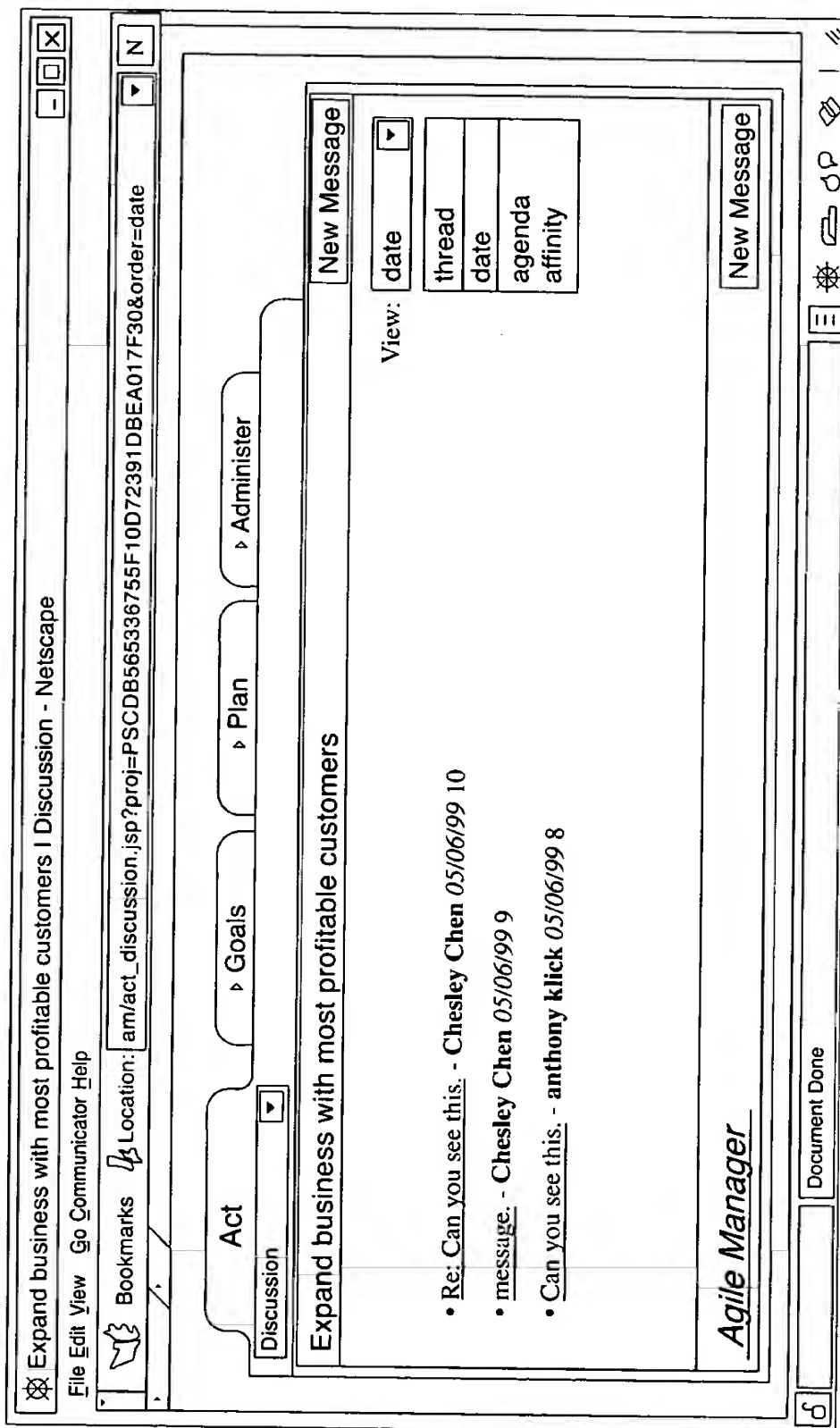


Fig. 30



31/40

Achieve a 20% ROI - Discussion - Netscape

File Edit View Go Communicator Help

Bookmarks Location 5/am/act\_discussion\_create?.jspproj+PSCDB565336755E10D72391DBEAD017F50 N

Post a New Discussion Message

Achieve a 20% ROI

Subject

Message

On the Agenda? ☒ Affinity Group: -Selected Group-   
or, New Group:

Priority: 3

Agile Manager

Document Done

Fig. 31



32/40

Achieve a 20% HDII Links I Edit - Netscape

File Edit View Go Communicator Help

Bookmarks Location 36755e10d72391BECD17F50&link-PSCDB556533674EB80D728ODOC9017E8G N

**Edit your link**

Achieve a 20% ROI

Edit your link information

Edit Link Name  
CFO Magazine - Financial Conferences

Edit Link URL  
http://www.cfonet.com/conferen.html

Or, upload a File:  
 

Edit Link Description  
Financial oriented conferences on topical issues facing many

Agile Manager

Document Done

Fig. 32



01 P.F. 35109-101301  
MAY 05 2003  
PATENT & TRADEMARK

33/40

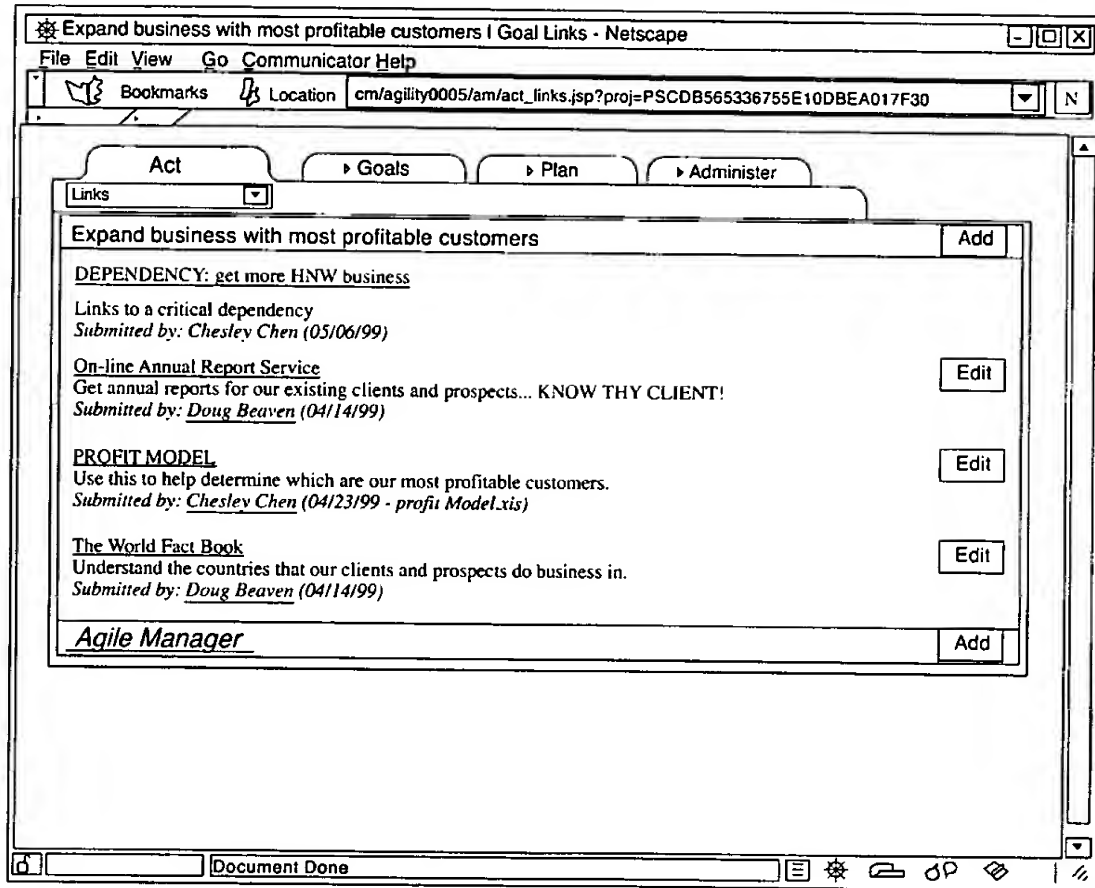


Fig. 33



EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K. Clifford and Richard E. Cavanagh, *The Winning Performance*

High Performance

- Traits
- Relish change
- Fight inertia
- Clear strategy
- Customer driven
- Act like owners
- Treated like owners
- Reward risk taking
- Fact based decisions
- Value based decisions
- Effective systems
- Open to new ideas
- Adapt
- Process changes
- Constant improvement
- Fluid boundaries
- Teamwork
- Anti-bureaucracy
- Know business drivers
- Make alliances
- Focused clearly
- Industry trends & challenges
- Basic Information
- Feedback

Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
-------------------	----------	-------------------	---------	----------------	-------	----------------	-------------

- 1. Managers in this company respect the rights of employees and treat them with dignity and respect.
- 2. Job objectives are aligned with the overall corporate vision.
- 3. Performance information is shared with employees so they stay focused on results.
- 4. Compensation and reward structures are aligned with company and/or unit performance.

Fig. 34



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✱ Achieve a 20% ROI - Delegate - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /agility0005/am/act\_delegate.jsp?proj=PSCDB565336755E10D72391DBEA017F50

N

Delegate-Select a New Owner

Cancel

Achieve a 20% ROI

Search:

Search

Cancel

Agile Manager

Document: Done

⏏

Fig. 34A



Act

Briefing

Goals

Plan

Administer

Deepen relationship with high net worth clients

**Expand business with most profitable customers**

Cross sell and up sell our products to our existing client base from a position of strength.

DEPENDENCY: get more HNW business

Links to a critical dependency. (05/06/99)

On-line Annual Report Service

Get annual reports for our existing clients and prospects... KNOW THY CLIENT! (04/14/99)

PROFIT MODEL

Use this to help determine which are our most profitable customers. (04/23/99) - Profit Model.xls)

The World Fact Book

Understand the countries that our clients and prospects do business in. (04/14/99)

Top Notch Marketing Firm

Link to marketing 1 to 1 (05/12/99)

Fig. 35



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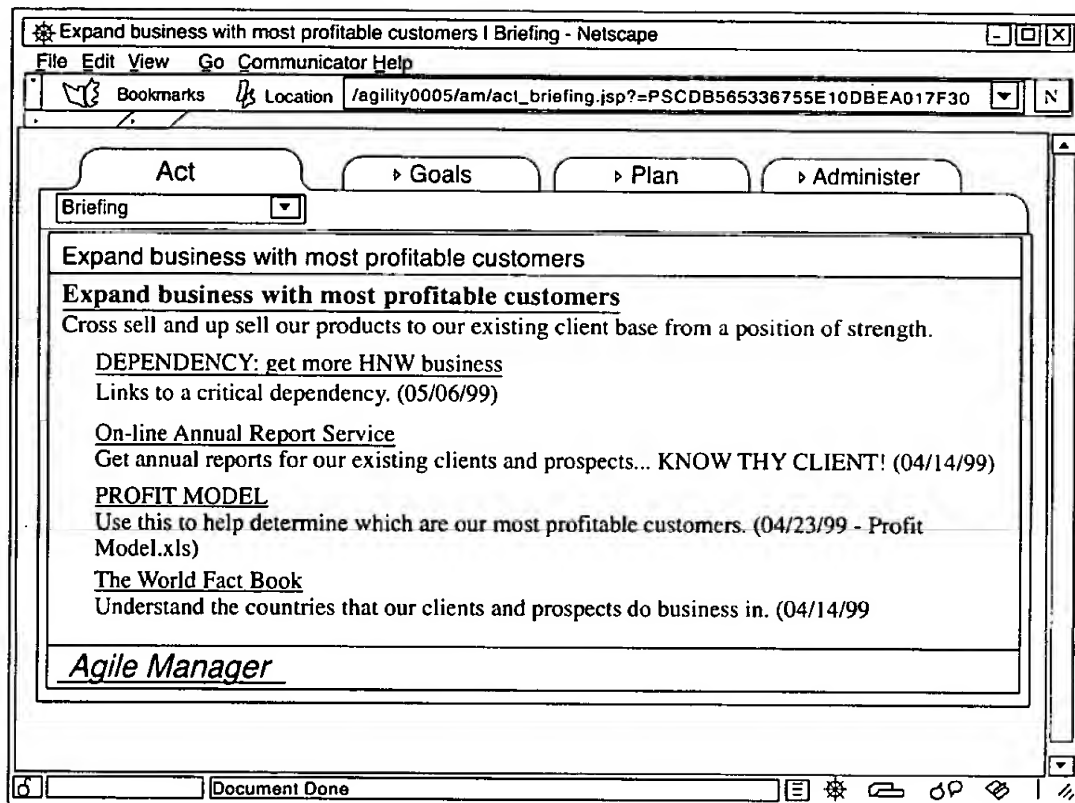


Fig. 36

OIPF JC169 EUBSU  
MAY 05 2003  
DELMARK

Expand business with most profitable customers | Components - Netscape

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Act

Components

Expand business with most profitable customers

Parent Goal: Select Parent

Subgoals:

- Deepen relationships with high net worth clients
- Have profitable products for every segment

Agile Manager

Components Plan Administer

Add Add

Document: Done

Fig. 37

File Edit View Go Communicator Help

Bookmarks Location: [http://psdemo.cinteractive.com/agility0005/am/act\\_project\\_move.jsp](http://psdemo.cinteractive.com/agility0005/am/act_project_move.jsp)

Select a new Parent

Achieve a 20% ROI

Search:  Search

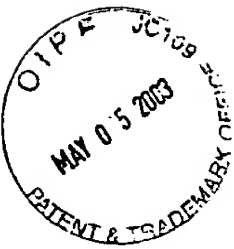
or Select from Project Hierarchy

Search Results:

Agile Manager

Document: Done

Fig. 38



40/40

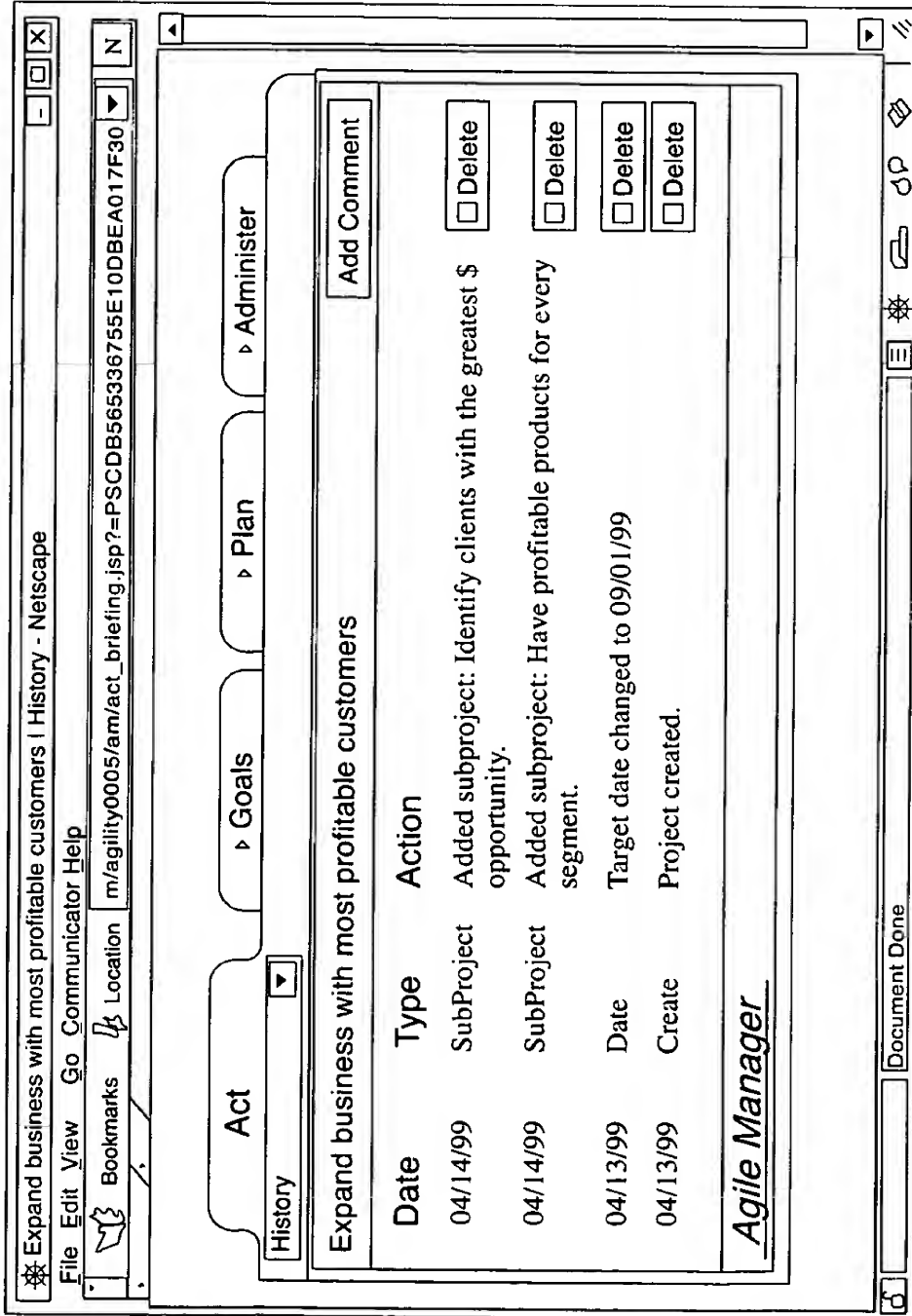


Fig. 39